



# **COMPREHENSIVE ENERGY EFFICIENCY PROGRAM FOR EXISTING RESIDENTIAL AND NONRESIDENTIAL BUILDINGS**

California Energy Commission

Request for Proposals

RFP #400-10-401

Pre-Bid Conference

Date: June 29, 2010



# Proposal Requirements

- REQUIRED FORMAT FOR PROPOSAL RESPONSE
- Consists of Three Sections
- Section 1 – Administrative Response
- Section 2 – Technical Response
- Section 3 – Cost Proposal



# Section 1, Administrative Response

Every Proposer must complete and include the following in Section 1.

## Section 1, Administrative Response

- Cover Letter
- Table of Contents
- Contractor Status Form
- Small Business Preference Certification (if applicable) (Or Non-Small Business Preference)
- Completed DVBE forms



# Section 1, Administrative Response

- Bidder Declaration Form GSPD-05-105
- Signed Certification Clauses
- Target Area Contract Preference Act Forms (if applicable)
- Enterprise Zone Act Forms (if applicable)
- Local Agency Military Base Recovery Act Forms (if applicable)
- Budget Documents for Hypothetical Work Authorization



# Section 2, Technical Response

Every Proposer must complete and include the following in Section 2.

- Approach to Tasks in Scope of Work
- Team Organizational Structure
- Project Team Experience and Qualifications
- Client References



# Section 3 – Cost Proposal

Every Proposer must complete and include the following in Section 3.

- Budget Summary, Attachment B-1
- Prime and Sub Rates, Attachment B-2
- Prime and Sub Indirect Percentage Rates, Attachment B-3



# Small/Non-Small Business Preference

- Small Business Preference – Certified Small Businesses or microbusinesses can claim the five percent preference when submitting a proposal. See RFP, Section III, page 6 of 7 for more information.
- Non-Small Business Preference – Bidder commits to small or micro business subcontractor participation of 25% of net bid price. See RFP, Section III, page 6 of 7 for more information.



# Disabled Veteran Business Enterprise (DVBE) Requirements

Full DVBE participation (3% of total Agreement amount)

Proposer commits to meet or exceed the DVBE participation requirements by either of the following methods:

Method A1 – Proposer is a Certified DVBE

Method A2 – Subcontractor is a certified DVBE and will receive at least 3% of the Agreement amount





# DVBE (cont'd)

A copy of an Agreement between the Contractor and the DVBE must be submitted prior to contract award. The Agreement may be in draft form but must show that the DVBE meets the Commercially Useful Function requirements as defined in the RFP.



# Tentative Key Activities and Dates

Deadline for Written Questions - June 29, 2010

Distribute Questions/Answers and Addenda (if any) to RFP - July 16, 2010

**Deadline to Submit Proposals by 3:00 p.m. - July 29, 2010**

Notice of Proposed Award - August 11, 2010

Commission Business Meeting - September 22, 2010



# Program Overview

- AB 758 requires the Energy Commission to develop a comprehensive program to achieve greater energy savings in the state's existing residential and nonresidential building stock
- The program must include these components:
  - Energy assessments; Building benchmarking; Energy rating; Cost-effective energy efficiency improvements; Public and private sector energy efficiency financing; Public outreach and education; and Green workforce training
- The purpose of this RFP is to select a technical support contractor to aid the Commission in the development and implementation of the program



# Scope of Work (SOW)

Task #	Task
1	Residential Needs Assessment
2	Nonresidential Needs Assessment
3	Home Energy Rating System
4	Building Energy Asset Rating System
5	Residential Rating and Disclosure Programs
6	Residential Efficiency Improvement Programs
7	Affordable Housing
8	Nonresidential Rating and Disclosure Programs
9	Nonresidential Efficiency Improvement Programs
10	Compliance and Enforcement
11	Measurement, Verification and Evaluation
12	Contingencies and Additional Topic Areas
13	Contract Management



## **SOW, Task 1:**

# **Residential Needs Assessment**

- Review all relevant efficiency program materials and interview known experts to summarize current status and identify needed activities to develop, implement and evaluate a comprehensive program that improves the energy efficiency of existing homes
- Recommend specific technical support work actions that should be funded for the CEC to successfully complete the activities identified above



# **SOW, Task 2: Nonresidential Needs Assessment**

- Review all relevant efficiency program materials and interview known experts to summarize current status and identify needed activities to develop, implement and evaluate a comprehensive program that improves the energy efficiency of existing nonresidential buildings
- Recommend specific technical support work actions that should be funded for the CEC to successfully complete the activities identified above



## **SOW, Task 3: Home Energy Rating System**

- Complete building science research and analysis to support HERS II implementation
- Support CEC staff to complete updates to or clarifications of the HERS II Technical Manual
- Develop technical guidelines, tutorials and other information for retrofit contractors to address issues that arise in the deployment of comprehensive residential retrofit programs



## **SOW, Task 4:**

# **Building Energy Asset Rating System**

- Research current and emerging nonresidential building energy asset rating systems
- Develop field assessment protocols
- Establish energy system benchmarks appropriate for CA nonresidential buildings
- Recommend a rating scale and graphical representation for the BEARS
- Develop functional requirements and test criteria for BEARS software
- Develop BEARS Technical Manual





## **SOW, Task 5: Residential Rating and Disclosure Programs**

- Identify issues and leverage opportunities of ARRA and utility comprehensive residential retrofit programs
- Develop public awareness strategies
- Develop training curricula
- Research options for disclosing ratings at time of sale, lease or rent
- Research options for disclosing ratings at date certain
- Develop pilot programs for rating disclosures
- Support CEC rulemaking activities



## **SOW, Task 6: Residential Efficiency Improvement Programs**

- Research options for efficiency improvements at time of sale, lease or rent
- Research options for efficiency improvements at date certain
- Document and publicize available and appropriate financing options for homeowners
- Develop pilot programs for efficiency improvements
- Support CEC rulemaking activities



# SOW, Task 7: Affordable Housing

- Extend the CUAC for major rehab project tax credits and other financing, plus existing multi-family retrofits
- Collaborate with state and local housing authorities to develop efficiency and renewable energy requirements for affordable housing projects
- Develop HERS II protocols and procedures that address the unique characteristics of multi-family buildings



## **SOW, Task 8: Nonresidential Rating and Disclosure Programs**

- Identify issues and leverage opportunities of AB 1103 implementation and utility operational benchmarking programs
- Develop building industry awareness strategies
- Develop training and certification requirements for BEARS Energy Assessors
- Research options for disclosing asset and operational ratings at time of financial transactions (possible updates to AB 1103 regulations)
- Research options for disclosing ratings at date certain
- Develop pilot programs for rating disclosures
- Support CEC rulemaking activities



## **SOW, Task 9: Nonresidential Efficiency Improvement Programs**

- Research options for efficiency improvements at time of sale, lease or rent
- Research options for efficiency improvements at date certain
- Document and publicize available and appropriate financing options for building owners
- Develop pilot programs for efficiency improvements
- Support CEC rulemaking activities



## **SOW, Task 10: CA Energy Code Compliance and Enforcement**

- Develop and pilot simplified permitting processes
- Develop media and outreach materials to contractors, building departments and consumers
- Evaluate pilots, identify benefits and issues
- Develop implementation plan for statewide deployment of simplified permitting



# **SOW, Task 11: Program Measurement, Verification and Evaluation**

- Establish baselines of energy use by building type, location and vintage
- Develop and integrate methods to collect program impact data
- Complete program impact and process evaluations



# **SOW, Task 12: Contingency and Additional Topic Areas**

Work not yet anticipated but within the scope of this RFP – in support of the CEC's development of comprehensive programs to improve the energy efficiency of existing buildings





# **SOW, Task 13: Contract Management**

- Kickoff Meeting
- Invoices
- Program Meetings and Briefings
- Manage Work Authorizations and Subcontractors
- Monthly Progress Reports
- Final Report



## California Energy Commission

# Evaluation Criteria - Technical

Criteria	Key Elements	Weight	Point Total
<b>1. Company / Team Organization</b>	<ul style="list-style-type: none"> <li>a. Team management structure</li> <li>b. Organization administrative structure</li> <li>c. Appropriate level and type of staffing</li> <li>d. Accessibility to the Energy Commission</li> <li>e. Approach to contract management</li> <li>f. Ability to effectively and efficiently recruit additional subcontractors in response to Commission direction</li> </ul>	2	20
<b>2. Experience and Qualifications</b>	<ul style="list-style-type: none"> <li>a. Specific knowledge and experience concerning each work statement task</li> <li>b. Demonstrated ability to organize and manage technical experts to effectively complete work statement tasks and deliverables in a timely manner</li> <li>c. Efficiency and effectiveness of proposed approaches to address topic areas not anticipated by this RFP</li> </ul>	2.5	25
<b>3. Approach to Work Statement and Methodology</b>	<ul style="list-style-type: none"> <li>a. Consistency with Work Statement emphasis and priorities</li> <li>b. Thoroughness and clarity of proposal</li> <li>c. Demonstrated experience with similar tasks</li> <li>d. Demonstrated understanding of Scope of Work tasks</li> <li>e. Ability to effectively modify approach to work to respond to Commission work authorization direction</li> </ul>	2.5	25
<b>Total Technical Score (Maximum Points)</b>			<b>70</b>



## California Energy Commission

# Evaluation Criteria - Cost

<b>4. Relative Ratio of Bidder Direct and Indirect Costs</b>	a. As compared to other Bidders in this RFP and typical practice as defined by other Energy Commission technical support contractors	1.5	15
<b>5. Appropriateness of Proposed Budget</b>	a. Budget is consistent with the scope of work described in the hypothetical work authorization b. Budget is itemized in sufficient detail to justify the expenditures c. Budget shows appropriate allocation of personnel and subcontractors to accomplish the activities described in the hypothetical work authorization d. The funds requested are appropriate, relative to the task activities described in the hypothetical work authorization	1.5	15
<b>Total Cost Score (Maximum Points)</b>			<b>30</b>
<b>OVERALL TOTAL SCORE (Maximum Points)</b>			<b>100</b>
<b>MINIMUM PASSING SCORE</b>			<b>70</b>



# **Questions and Answers**



# Whom to Contact?

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